A Survey Of
ANIMAL HEALTH PRODUCTS And FEED
Among Readers Of

Farm Supplier

- Feed Tonnage Sold, By Type
- Feed Preparation By Dealers
- Manufacturers Who Supply Feed To Dealers
- Dollar Sales Of Feed, Animal Health Products
- Animal Health Products Sold,
  By Type, By "Packaged" Or Feed Additive,
  By Class Of Animal, By Manufacturer Or
  Brand, Best-Selling Brands
- Number Of Farms Served
- Other Information

November 1980

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FARM SUPPLIER ANIMAL HEALTH PRODUCTS AND FEED SURVEY

Purpose of Survey

The purpose of this 1980 survey was to update an animal health product and feed survey made ten years earlier, and to measure related other areas.

SURVEY METHOD

Sample Design: Every nth name was computer-drawn from the February 1980 BPA qualified Farm Supplier circulation list of U.S. retail farm supply dealers to cover this list and yield about 1,700 names. From this group, 800 names were systematically selected by formula (with most of the balance designated for use in another survey). The circulation list was arranged according to alpha-numeric identification number systematically assigned by computer analysis of each recipient's last name.

Sample Size:

Number in mailing sample.....	800
Number of usable returns.....	430
Number of unusable returns.....	25
Number of returns.....	455
Percent response.....	56.9%

Questionnaire Design: The questionnaire, at the back of this report, was designed to obtain the information that the Farm Supplier staff and manufacturers of animal health products or feed felt was most needed. The order, arrangement, and wording of the questions were guided by generally accepted mail survey technique.

Mailing Procedure: The cards containing the computer-printed survey sample names and addresses were numbered consecutively. Each questionnaire mailed was also numbered to correspond to the number assigned the recipient on the card.

The first mailing went out on June 9, 1980. About a week later a post card reminder was sent to persons on the sample list.

A follow-up questionnaire was mailed on July 1 to all non-respondents. A week later post card reminders were sent to persons receiving the second questionnaire.

A third questionnaire (second follow-up) identical to those in the earlier mailings went out to second mailing non-respondents on July 14.

Tabulation and Report Writing: The survey returns were tabulated by Analytical Computer Service, Inc., Chicago, and by the Watt Publishing Company Research Section which wrote this report.

FARM SUPPLIER ANIMAL HEALTH PRODUCTS AND FEED SURVEY

HIGHLIGHTS

1. 67% of Farm Supplier retail dealers sell feed to farmers. In the survey year ending about June 30 1980 the largest feed tonnage sold by the combined feed dealers was dairy feed; followed in order by feed for swine; layers, breeders and pullets; beef cattle; horses; turkeys; broilers; dogs, cats and other pets; rabbits; sheep; and fish. (pages 5 - 9)

2. Average tonnage of all feeds sold grew from 2,300 tons per feed dealer earlier reported for 1970 to about 3,700 tons in the current survey year - up 62%. (page 10)

3. During the survey year 34% of the feed dealers sold premix averaging about 119 tons each. (pages 10, 11)

4. Average feed sales increased from $213,000 per feed dealer earlier reported for 1970 to about $638,000 each in the current survey year - up 200%. The different methods of feed preparation by dealers contributed the following percentages of total feed sales: (1) 39% of the $638,000 came from feed manufactured by dealers from a premix; (2) 29% came from complete feed bought and resold without change; (3) 19% came from supplement blended with grain; (4) 10% came from feed manufactured from the ground up; and (5) about 3% came from other feed preparations. (pages 10, 11)

5. The types of feed equipment used by the largest percent of feed dealers - 61% - are bulk feed bins and bulk feed truck bodies, followed by hammermills (59%), bucket elevators (54%), and screw conveyors (47%). 62% use one or more types of feed conveyors - up from 41% earlier reported for 1971. (page 14)

(MORE)

6. Of the 12% of feed dealers who bought one or more of 15 types of feed equipment in the survey year, the largest percent - 41% - bought bulk feed truck bodies, 37% bought feed conveyors, and 28% bought bulk feed bins. (page 15)

7. Among the 67% of dealers that stock and sell animal health products . . .
   (a) 69% sold feed additive health products averaging about $16,850 per seller in the twelve months ending June 30 1980 - up 93.7% from the $8,700 earlier reported for 1970, and
   (b) 99% sold "packaged" health products in forms such as injectable, soluble, bolus, tablet etc. averaging about $19,930 per seller in the survey year - up 271% from $5,377 in 1970. (pages 21, 34)

8. Of the dealers who stock and sell packaged health products for livestock, 95% handle wormers; 89% sold antibiotics - up from 77% earlier reported for 1971; 87% sold calf scours tablets - up from 83%; 84% sold vitamins - up from 75%; and 81% sold injectable iron - up from 71%. (page 22)

9. Packaged soluble antibiotics for on-farm adding to water by the farmer have become the most widely-sold antibiotic form, now sold by 78% of antibiotic dealers - up from 67% in 1971. (page 31)

10. 53% of animal health product dealers expect their future animal health product sales (after adjusting for inflation) to "Increase"; 37% expect them to "Stay about the same"; and only 10% expect a "Decrease." (page 35)

11. 74% of the animal health product dealers report that when a farmer comes to buy a packaged health product he usually does not have a brand name that he requests without discussion. When these dealers were asked "Does he usually buy the brand that you recommend?" 99% answered "Yes." (page 35)

12. During the survey year Farm Supplier dealers served an average of about 264 farms per dealer. (page 38)

FARM SUPPLIER ANIMAL HEALTH PRODUCTS AND FEED SURVEY

DETAILED FINDINGS

1. "Do you sell feed to farmers?"

Percent of (428 reporting) dealers* answering "Yes"..... 67%

(a) Types Of Feed Sold To Farmers

	Among Dealers Who Sell Feed, Percent Reporting
Respondents..	285
Beef feed.....	90%
Broiler feed.....	43%
Dairy feed.....	81%
Dog, cat, and/or other pet food....	91%
Fish feed.....	38%
Horse feed.....	81%
Layer, breeder, or replacement feed	79%
Rabbit feed.....	79%
Sheep feed.....	46%
Swine feed.....	92%
Turkey feed.....	29%
Other feed.....	16%

*"Dealers" refers to the Farm Supplier BPA qualified U.S. circulation list of approximately 18,727 retail dealers as of the February 1980 study issue.

2. "About how many tons of each type of feed did you sell in the last twelve months?"

Beef Cattle

	Percent of Beef Feed Dealers Reporting
Respondents..	221
500 or more tons.....	23%
100 - 499 tons.....	37%
50 - 99 tons.....	15%
Under 50 tons.....	25%

Average tons of beef feed sold in the 12 months ending about June 30 1980, per dealer selling any..... 514 tons

Broiler Feed

	Percent of Broiler Feed Dealers Reporting
Respondents..	99
100 or more tons.....	11%
11 - 99 tons.....	58%
5 - 10 tons.....	10%
Under 5 tons.....	21%

Average tons of broiler feed sold in the 12 months ending about June 30 1980, per dealer selling any..... 139 tons

Dairy Feed

	Percent of Dairy Feed Dealers Reporting
Respondents..	193
Over 500 tons.....	32%
50 - 500 tons.....	39%
Under 50 tons.....	29%

Average tons of dairy feed sold in the 12 months ending about June 30 1980, per dealer selling any..... 1,354 tons

2. (cont.)

Dog, Cat, And/Or Other Pet Food

	Among Dealers Who Sell Dog, Cat And/Or Other Pet Food, Percent Reporting
Respondents..	215
100 or more tons.....	16%
25 - 99 tons.....	28%
10 - 24 tons.....	28%
Under 10 tons.....	28%

Average tons of dog, cat and/or other pet food sold in the 12 months ending about June 30 1980, per dealer selling any..... 57 tons

Fish Feed

	Percent of Fish Feed Dealers Reporting
Respondents..	78
10 or more tons.....	15%
3 - 9 tons.....	25%
2 tons.....	17%
1 ton.....	43%

Average tons of fish feed sold in the 12 months ending about June 30 1980, per dealer selling any..... 18 tons

Horse Feed

	Percent of Horse Feed Dealers Reporting
Respondents..	192
100 or more tons.....	27%
25 - 99 tons.....	23%
5 - 24 tons.....	30%
Under 5 tons.....	20%

Average tons of horse feed sold in the 12 months ending about June 30 1980, per dealer selling any.....140 tons

2. (cont.)

Layer, Breeder, or Replacement Feed

	Percent of Layer, Breeder, or Replacement Feed Dealers Reporting
Respondents..	183
1,000 or more tons...	11%
100 - 999 tons.....	22%
50 - 99 tons.....	31%
Under 50 tons.....	36%

Average tons of layer, breeder, or replacement feed sold in the 12 months ending about June 30 1980, per dealer selling any..... 1,135 tons

Rabbit Feed

	Percent of Rabbit Feed Dealers Reporting
Respondents..	175
50 or more tons.....	10%
10 - 49 tons.....	33%
5 - 9 tons.....	19%
2 - 4 tons.....	21%
1 ton.....	17%

Average tons of rabbit feed sold in the 12 months ending about June 30 1980, per dealer selling any..... 19 tons

Sheep Feed

	Percent of Sheep Feed Dealers Reporting
Respondents..	98
50 or more tons.....	9%
10 - 49 tons.....	37%
3 - 9 tons.....	26%
1 or 2 tons.....	28%

Average tons of sheep feed sold in the 12 months ending about June 30 1980, per dealer selling any..... 23 tons

2. (cont.)

Swine Feed

	Percent of Swine Feed Dealers Reporting
Respondents..	224
1,000 or more tons...	25%
300 - 999 tons.....	30%
50 - 299 tons.....	26%
Under 50 tons.....	19%

Average tons of swine feed sold in the 12 months ending about June 30 1980, per dealer selling any..... 996 tons

Turkey Feed

	Percent of Turkey Feed Dealers Reporting
Respondents..	53
200 or more tons.....	11%
10 - 199 tons.....	42%
Under 10 tons.....	47%

Average tons of turkey feed sold in the 12 months ending about June 30 1980, per dealer selling any..... 232 tons

Other Feed

	Percent of Sellers of Other Feed Reporting
Respondents..	40
200 or more tons.....	23%
50 - 199 tons.....	30%
10 - 49 tons.....	35%
Under 10 tons.....	12%

Average tons of other feed sold in the 12 months ending about June 30 1980, per dealer selling any..... 166 tons

FS Health Products/Feed Survey (cont.)

2. (cont.)

All Feeds

	Percent of Feed Dealers Reporting
Respondents..	248
3,000 or more tons...	24%
1,000 - 2,999 tons...	33%
500 - 999 tons.....	19%
Under 500 tons.....	24%

Average tons of all feeds sold in the 12 months ending about June 30 1980, per dealer selling any feed..... 3,724 tons

3. (a) "In what form(s) do you sell feed?"

	Percent of Feed Dealers Reporting
Respondents..	277
Complete Feed.....	94%
Feed Supplement.....	78%
Premix.....	34%

(b) "What was the approximate dollar value of your total feed sales in the last twelve months?"

	Percent of Feed Dealers Reporting
Respondents..	220
$1,000,000 or more..	19%
$300,000 - $999,999.	36%
$100,000 - $299,999.	25%
Under $100,000.....	20%

Average value of total feed sold in the 12 months ending about June 30 1980, per feed dealer..... $638,000

4. "About how many tons of premix, if any, did you sell in the last twelve months?"

	Among Dealers Who Sold Premix In The Preceding 12 Months, Percent Reporting
Respondents..	93
200 or more tons.....	20%
25 - 199 tons.....	31%
10 - 24.9 tons.....	25%
Under 10 tons.....	24%

Average tons of feed premix sold in the 12 months ending about June 30 1980, per dealer selling any..... 119 tons

5. How Feed Dealers Prepare Their Feed

	Percent of Feed Dealers Reporting
Respondents..	268
Blend supplement with grain.....	59%
Manufacture feed from a premix.....	23%
Manufacture feed from the ground up.....	24%
Buy complete feed and re-sell it as is.....	88%
Other.....	3%

(a) "About what percent of your 12-month feed dollar volume came from feed you provided . . ."

	Weighted PERCENT OF 12-Month Feed Dollar VOLUME
Respondents..	191
by blending supplement with grain.....	19%
by manufacturing feed from a premix.....	39%
by manufacturing feed from the ground up.....	10%
by buying complete feed and reselling it as is	29%
in any other way.....	3%
	100%

5. (cont.)

(b) "Do you use urea?"

Percent of (245 reporting) feed dealers answering "Yes"..... 21%

Urea Tonnage Bought In The Preceding Twelve Months

	Among Feed Dealers Who Use Urea, Percent Reporting
Respondents..	33
100 or more tons.....	18%
10 - 99.9 tons.....	43%
5 - 9.9 tons.....	15%
Under 5 tons.....	24%

Average tons of urea bought in the 12 months ending about June 30 1980, per dealer buying any..... 44 tons

(c) "Do you use any feed flavors?"

Percent of (225 reporting) feed dealers answering "Yes".... 17%

6. "Do you stock and sell liquid feed supplements?"

Percent of (275 reporting) feed dealers answering "Yes"..... 44%

(a) "If 'yes,' about how many tons of liquid feed supplements did you sell in the last twelve months?"

	Among Dealers Who Sell Liquid Feed Supplements Percent Reporting
Respondents..	108
1,000 or more tons.....	4%
200 - 999 tons.....	25%
100 - 199 tons.....	25%
50 - 99 tons.....	27%
Under 50 tons.....	19%

Average tons of liquid feed supplements sold in the 12 months ending about June 30 1980, per dealer selling any..... 164 tons

7(a). TYPES OF FEED EQUIPMENT USED IN DEALERS' BUSINESS

	Percent of Feed Dealers Reporting
Respondents..	266
Burr mill	3%
Hammermill	59%
Horizontal mixer	32%
Vertical mixer	44%
Complete package mill	3%
Corn sheller	17%
Crimper mill	18%
Pellet mill and cooler	9%
Lift truck	26%
Front end loader	22%
Mobile mill	3%
Roller mill	22%
Bag closer	33%
Bulk feed bins	61%
Bulk feed truck bodies	61%
Truck hoist	39%
Rail car unloader	9%
Bucket elevator	54%
Screw conveyor (exclude augers on vehicles)	47%
Other conveyors	20%
Other	1%

7(a). (cont.)

Percent of feed dealers who bought any of the fe l equipment mentioned in 7(a) in the preceding twelve months..... 12%

(1) Type(s) Of Feed Equipment Bought In The Preceding Twelve Months

	Among Feed Dealers Who Bought Feed Equipment In The Preceding 12 Months, Percent Reporting
Respondents..	32
Hammermill.....	9%
Horizontal mixer.....	6%
Complete package mill.....	6%
Crimper mill.....	3%
Pellet mill and cooler....	3%
Lift truck.....	9%
Front end loader.....	3%
Roller mill.....	3%
Bag closer.....	9%
Bulk feed bins.....	28%
Bulk feed truck bodies....	41%
Truck hoist.....	6%
Rail car unloader.....	6%
Bucket elevator.....	9%
Screw conveyor (excludes augers on vehicles).....	19%
Other conveyors.....	16%

(b) "Do you stock and sell bulk feed bins?"

Percent of (110 reporting) feed dealers answering "Yes"... 39%

8. FEED MANUFACTURERS' FEED HANDLED BY DEALERS

	Percent of Feed Dealers Reporting
Respondents..	264
Agway	5%
Allied Mills (Wayne)	10%
Cargill (Nutrena)	9%
Carnation	19%
Central Soya (Master Mix)	13%
Conagra	3%
Farmland	10%
FS Services	2%
Golden Sun	2%
Hubbard Milling	4%
Indiana Farm Bureau Co-op	3%
International Multifoods (Supersweet)	4%
Kent	5%
Land O'Lakes	12%
Ralston Purina	31%
Other	37%

(a) "From which of the manufacturers in question 8 above did you buy any premixes in the last twelve months?"

	Among Dealers Who Bought Premixes In The Preceding Twelve Months, Percent Reporting
Respondents..	79
Agway	4%
Allied Mills (Wayne)	4%
Cargill (Nutrena)	6%
Carnation	6%
Central Soya (Master Mix)	10%
Conagra	1%
Farmland	11%
FS Services	4%
Hubbard Milling	3%
Indiana Farm Bureau Co-op	8%
Kent	4%
Land O'Lakes	10%
Ralston Purina	18%
Other	22%

9. "How knowledgeable and helpful are most of the feed and/or animal health company salespeople that call on you?"

	Percent of Feed Dealers Reporting
Respondents..	268
Very.....	48%
Moderately.....	42%
Slightly.....	7%
Not at all.....	3%

(a) "Which two feed and/or animal health companies' sales representatives seem the most knowledgeable and helpful to you?"

	Percent of Feed Dealers Writing-In
Respondents..	198
Ralston Purina.....	27%
Farmland.....	10%
Cargill (6%), Nutrena (2%).....	8%
Central Soya (5%), Master Mix (3%)....	8%
Allied Mills (4%), Wayne (2%).....	6%
Carnation.....	6%
Elanco.....	6%
Agway.....	4%
Anchor.....	4%
Kent.....	4%
Land O'Lakes.....	4%
Merck.....	4%

9(a). (cont.)

	Percent of Feed Dealers Reporting
Pfizer	4%
Supersweet	4%
American Cyanamid	2%
Doboy Feeds	2%
Franklin Lab	2%
Golden Sun	2%
Holt Products	2%
Hubbard	2%
Tuco	2%
Tuft & Sons	2%
United Supplies	2%
Co-op	1%
Gooch	1%
Indiana Farm Bureau Co-op	1%
Midland	1%
New Holland Supply Co	1%
Shell	1%
Walco	1%
Miscellaneous (mentioned once each)	31%

10. "Have you sponsored a farmer meeting in cooperation with your feed supplier in the last twelve months?"

Percent of (276 reporting) feed dealers answering "Yes"..... 54%

If "Yes," . . .

(a) "How many meetings?"

Among Dealers Who Sponsored Farmer Meetings In Cooperation With Their Feed Supplier, Percent Reporting	
Respondents..	144
5 or more meetings.....	10%
3 or 4 meetings.....	22%
2 meetings.....	38%
1 meeting.....	30%

Average number of meetings sponsored in the 12 months ending about June 30 1980, per dealer sponsoring any..... 2 or 3 (2.5) meetings

(b) "About how many farmers attended, on the average, per meeting?"

Among Dealers Who Sponsored Farmer Meetings In Cooperation With Their Feed Supplier, Percent Reporting	
Respondents..	143
60 or more farmers.....	20%
35 - 59 farmers.....	26%
25 - 34 farmers.....	27%
Under 25 farmers.....	27%

Average number of farmers who attended per meeting..... 44 farmers

10. (cont.)

(c) "Was the meeting in the morning, afternoon, or evening?"

Among Feed Dealers Sponsoring Farmer Meetings In Cooperation With Their Feed Suppliers, Percent Reporting

Respondents..	145
Morning.....	23%
Afternoon.....	37%
Evening.....	69%

(d) "Did you serve breakfast, lunch, or dinner?"

Among (142 reporting) feed dealers who sponsor farmer meetings in cooperation with their feed suppliers, percent answering "Yes"..... 97%

(e) "Will you hold more meetings?"

Among (144 reporting) feed dealers who sponsor farmer meetings in cooperation with their feed suppliers, percent answering "Yes"..... 98%

11. "Do you stock and sell silage preservatives or additives?"

Percent of (306 reporting) dealers answering "Yes"..... 67%

12. "Do you stock and sell any animal health products - either as feed additives, or as "packaged" health products sold in forms such as injectable, soluble, bolus, tablet etc.?"

Percent of (393 reporting) dealers answering "Yes"..... 67%

(a) "If 'yes,' which of the following do you sell?"

	Percent of Animal Health Product Dealers Reporting
Respondents..	256
"Packaged" health products for livestock.....	98%
Feed additive health products for livestock.	68%
"Packaged" health products for poultry.....	66%
Feed additive health products for poultry...	31%
(Any "packaged" health products.....	99%)
(Any feed additive health products.....	69%)

13. "How many people in your farm supply dealership sell animal health products?"

	Percent of Animal Health Product Dealers Reporting
Respondents..	244
6 or more people.....	11%
4 or 5 people.....	26%
3 people.....	27%
2 people.....	27%
1 person.....	9%

Average number of people selling animal health products, per farm supply dealership selling any..... 3 or 4 (3.4) people

14. TYPES OF LIVESTOCK (OTHER THAN POULTRY) HEALTH PRODUCTS DEALERS STOCK AND SELL

	Among Dealers Stocking and Selling "PACKAGED" Health Products For Livestock, Percent Reporting	Among Dealers Stocking and Selling Health Products Sold As FEED ADDITIVES For Livestock, Percent Reporting
Respondents..	255	126
Antibiotics.....	89%	82%
Bloat preventive.....	50%	18%
Calf scours tablets.....	87%	
Grub controls.....	68%	10%
Injectable iron.....	81%	
Liniment.....	42%	
Mastitis treatment.....	70%	
Miticides.....	25%	
Nitrofurans.....	28%	13%
Ointment and Salves.....	63%	
Sulfa drugs.....	71%	48%
Tonics.....	19%	2%
Vaccines.....	62%	
Vitamins.....	84%	69%
Wormers.....	95%	72%
Other types.....	1%	2%

Percent of (259 reporting) animal health product dealers who stock and sell packaged and/or feed additive . . .

livestock antibiotics.... 92%

livestock grub controls.. 67%

livestock vitamins..... 86%

livestock wormers..... 95%

15. TYPES OF POULTRY HEALTH PRODUCTS DEALERS STOCK AND SELL

	Among Dealers Stocking and Selling "PACKAGED" Health Products For Poultry, Percent Reporting	Among Dealers Stocking and Selling Health Products Sold As FEED ADDITIVES For Poultry, Percent Reporting
Respondents..	172	50
Antibiotics.....	76%	76%
Anti-Blackhead drug.....	17%	8%
Antigens.....	2%	
Bacterins.....	6%	
Anticoccidial agents.....	22%	32%
Lice controls.....	78%	
Miticides.....	23%	
Nitrofurans.....	16%	12%
Sulfa drugs.....	42%	36%
Vaccines.....	16%	
Vitamins.....	56%	52%
Wormers.....	74%	34%
Other.....	1%	4%

Percent of (173 reporting) animal health product dealers who stock and sell packaged and/or feed additive . . .

poultry antibiotics.. 79%

poultry vitamins..... 59%

poultry wormers..... 75%

Percent of (260 reporting) animal health product dealers who stock and sell packaged livestock and/or poultry vaccines..... 62%

Percent of (260 reporting) animal health product dealers who stock and sell packaged and/or feed additive . . .

livestock and/or poultry antibiotics. 93%

livestock and/or poultry vitamins.... 86%

livestock and/or poultry wormers..... 97%

16. ANIMAL-SPECIFIC CLASSES OF HEALTH PRODUCTS DEALERS STOCK AND SELL

	Percent of Animal Health Product Dealers Reporting
Respondents..	259
Cattle wormer(s).....	93%
Hog wormer(s).....	94%
(Cattle and/or hog wormers.....	97%)
Grub control products for cattle.....	70%
Antibiotics for beef cattle feed.....	75%
Antibiotics for dairy cattle feed.....	63%
Antibiotics for hog feed.....	72%
(One or more of preceding three items.....	83%)
Antibiotics for treating sick beef cattle.....	65%
Antibiotics for treating sick dairy cattle.....	56%
(Either or both of preceding two items.....	66%)
Antibiotics for treating sick hogs.....	66%
(Antibiotics for treating sick cattle and/or hogs..	71%)
(Any of above six antibiotics.....	90%)

(a) "In what form(s) are the wormers that you sell, if any?"

	Among Dealers Who Sell Wormers, Percent Reporting
Respondents..	247
Feed additive....	83%
Bolus.....	58%
Drench.....	28%
Soluble powder...	60%
Liquid.....	72%
Other.....	9%

17. BRANDS OF CATTLE WORMERS DEALERS STOCK AND SELL

	Among Dealers Who Stock and Sell Cattle Wormers, Percent Reporting
Respondents..	240
Thiabenzole.....	87%
Tramisol.....	79%
Phenothiazine.....	41%
Baymix.....	39%
Other.....	1%

(a) Largest Selling (dollar volume) Cattle Wormer

	Among Dealers Who Stock and Sell Cattle Wormers, Percent Reporting
Respondents..	185
Thiabenzole.....	51%
Tramisol.....	32%
Phenothiazine.....	4%
Baymix.....	13%

18. "Do you stock and sell cattle implants?"

Percent of (249 reporting) animal health product dealers answering "Yes"..... 38%

(a) "If 'yes,' which brand(s)?"

	Among Dealers Who Stock and Sell Cattle Implants, Percent Reporting
Respondents..	93
Ralgro (IMC).....	95%
Synovex (Syntex)....	19%
Other.....	-

19. BRANDS OF HOG WORMERS DEALERS STOCK AND SELL

	Among Dealers Who Stock and Sell Hog Wormers, Percent Reporting
Respondents..	242
Atgard-V.....	80%
Piperazine.....	83%
Hygromix.....	9%
Tramisol.....	79%
Banminth.....	29%
Mecadox.....	22%
Other.....	1%

(a) Largest Selling (dollar volume) Hog Wormer

	Among Dealers Who Stock and Sell Hog Wormers, Percent Reporting
Respondents..	167
Atgard-V.....	32%
Piperazine.....	28%
Hygromix.....	-
Tramisol.....	32%
Banminth.....	4%
Mecadox.....	3%
Other.....	1%

20. BRANDS OF GRUB CONTROL PRODUCTS DEALERS CARRY

	Among Dealers Who Carry Grub Control Products, Percent Reporting
Respondents..	194
Ruelene.....	22%
Co-Ral.....	70%
Neguvon.....	19%
Warbex.....	64%
Other.....	4%

21. ANIMAL HEALTH COMPANIES WHOSE BRANDS OF ANTIBIOTICS, ANTIBACTERIALS AND/OR GROWTH PROMOTANTS DEALERS STOCK AND SELL FOR INCLUSION IN FEED

	Among Dealers Who Stock and Sell Antibiotics, Antibacterials and/or Growth Promotants For Inclusion In Feed, Percent Reporting For . . .				
	Beef Cattle	Dairy Cattle	Hogs	Poultry	Horses
Respondents..	152	107	142	61	34
A. L. Laboratories	2%	7%	5%	5%	3%
American Cyanamid	68%	55%	58%	38%	29%
American Hoechst	-	-	3%	-	-
Ceva Laboratories (formerly Abbott Labs)	2%	6%	5%	-	3%
Diamond Shamrock	15%	13%	19%	10%	9%
Elanco Products	51%	36%	61%	20%	12%
Hess & Clark Div., Rhone-Poulenc	14%	16%	20%	25%	6%
I.M.C	3%	1%	-	3%	-
Merck	29%	26%	18%	15%	15%
Pfizer	58%	58%	62%	49%	56%
Rachelle Laboratories	7%	3%	16%	3%	-
Roche Chemical Div., Hoffmann-La Roche	3%	2%	8%	3%	-
Salsbury Laboratories	19%	14%	26%	33%	6%
SmithKline	4%	10%	10%	2%	-
Thompson Hayward	2%	2%	2%	2%	6%
TUCO	20%	30%	27%	8%	-
West Agro-Chemical	5%	12%	3%	2%	3%
Whitmoyer Labs	8%	7%	12%	8%	-
Other	8%	10%	10%	11%	32%

21. (cont.)

(a) Largest Selling (dollar volume) Antibiotics For Preventive Care

	Among Dealers Who Sell Antibiotics For Inclusion In Feed, Percent Reporting For . . .				
	Beef Cattle	Dairy Cattle	Hogs	Poultry	Horses
Respondents..	78	54	64	37	22
A. L. Laboratories.....	-	2%	-	-	-
American Cyanamid.....	32%	28%	20%	11%	9%
Ceva Laboratories (formerly Abbott Labs).....	1%	2%	2%	-	-
Diamond Shamrock.....	3%	2%	3%	5%	5%
Elanco Products.....	17%	10%	24%	3%	-
Hess & Clark Div., Rhone-Poulenc.....	4%	6%	3%	3%	-
I.M.C.....	-	-	-	3%	-
Merck.....	6%	4%	3%	8%	5%
Pfizer.....	17%	20%	21%	23%	36%
Roche Chemical Div., Hoffmann-La Roche.....	-	-	-	3%	-
Salsbury Laboratories.....	9%	4%	6%	22%	-
SmithKline.....	-	-	3%	-	-
Thompson Hayward.....	1%	2%	-	3%	5%
TUCO.....	-	6%	2%	-	-
West Agro-Chemical.....	-	-	-	-	5%
Whitmoyer Labs.....	-	2%	2%	3%	-
Other.....	10%	12%	11%	13%	35%

22. ANIMAL HEALTH COMPANIES WHOSE BRANDS OF ANTIBIOTICS DEALERS STOCK AND SELL IN INJECTABLE, SOLUBLE OR BOLUS FORM

	Among Dealers Who Stock and Sell Antibiotics In Injectable, Soluble or Bolus Form, Percent Reporting For . . .				
	Beef Cattle	Dairy Cattle	Hogs	Poultry	Horses
Respondents..	158	123	148	54	57
American Cyanamid.....	52%	45%	45%	31%	19%
American Scientific Laboratories.....	1%	-	3%	2%	4%
Anchor Laboratories.....	55%	52%	55%	33%	39%
Ceva Laboratories (formerly Abbott Labs).....	5%	6%	7%	2%	4%
Diamond Shamrock.....	8%	6%	9%	6%	4%
Elanco Products.....	56%	48%	57%	9%	7%
Farnam.....	9%	6%	5%	13%	49%
Franklin.....	16%	11%	11%	7%	12%
Merck.....	29%	17%	17%	11%	14%
Pfizer.....	68%	67%	58%	63%	58%
Rachelle Laboratories.....	3%	2%	3%	4%	2%
Syntex.....	8%	2%	4%	4%	4%
Vineland Laboratories.....	2%	2%	3%	7%	-
Whitmoyer Laboratories.....	11%	8%	12%	7%	-
Other.....	5%	5%	7%	7%	10%

22. (cont.)

(a) Largest Selling (dollar volume) Antibiotics For Disease Treatment

	Among Dealers Who Stock and Sell Antibiotics In Injectable, Soluble or Bolus Form, Percent Reporting For . . .				
	Beef Cattle	Dairy Cattle	Hogs	Poultry	Horses
Respondents..	70	53	67	32	37
American Cyanamid.....	10%	6%	4%	16%	-
American Scientific Laboratories.....	-	-	-	-	-
Anchor Laboratories.....	17%	25%	21%	16%	14%
Ceva Laboratories (formerly Abbott Labs).....	1%	2%	1%	-	-
Diamond Shamrock.....	-	-	1%	3%	-
Elanco Products.....	16%	19%	34%	-	-
Farnam.....	1%	4%	-	-	43%
Franklin.....	4%	2%	1%	-	-
Merck.....	9%	4%	1%	6%	5%
Pfizer.....	39%	38%	27%	41%	41%
Rachelle Laboratories.....	-	-	-	-	-
Syntex.....	-	-	-	-	-
Vineland Laboratories.....	-	-	-	6%	-
V.P.O.....	-	-	-	-	-
Whitmoyer Laboratories.....	-	2%	3%	6%	-
Other.....	4%	4%	4%	9%	3%

23. "Do you file any FD-1800's with the FDA for mixing drugs into your feeds?"

Percent of (210 reporting) animal health product dealers answering "Yes"..... 28%

24. "Which of the following forms of antibiotics do you stock and sell, if any?"

	Among Dealers Who Stock and Sell Antibiotics, Percent Reporting
Respondents.. 211	
Sell antibiotic(s) included in the feed that goes to the farmer	71%
Sell antibiotic(s) packaged for on-farm adding to feed by farmer	68%
Sell packaged soluble antibiotic(s) for on-farm adding to water by farmer	78%

25. "Do you stock and sell horse health care products?"

Percent of (240 reporting) animal health product dealers answering "Yes"..... 64%

(a) Types Of Horse Health Care Products Dealers Sell

	Among Dealers Who Stock and Sell Horse Health Care Products, Percent Reporting
Respondents.. 163	
Wormers	94%
Shampoo	67%
Vitamin-mineral conditioner(s)	75%
Hoof dressing(s)	65%
Liniment(s)	63%
Antiseptic ointment(s)	48%
Fly control products	94%
Other	2%

25. (cont.)

(b) Largest Selling (dollar volume) Horse Health Care Items (Among The Top Two)

	Among Dealers Who Stock and Sell Horse Health Care Products, Percent Reporting
Respondents..	115
Wormers	81%
Shampoo	5%
Vitamin-mineral conditioner(s)	40%
Hoof dressing(s)	1%
Liniment(s)	3%
Antiseptic ointment(s)	1%
Fly control products	53%

(c) Total Sales Of Horse Health Care Products In Preceding Twelve Months

	Among Dealers Who Stock and Sell Horse Health Care Products, Percent Reporting
Respondents..	148
$5,000 or more	17%
$2,000 to $4,999	22%
$500 to $1,999	30%
Under $500	31%

(d) "Do you stock and sell books on horse care?"

Percent of (143 reporting) horse health care product dealers answering "Yes"..... 27%

26. MANUFACTURERS WHOSE BRANDS OF VACCINES OR OTHER BIOLOGICALS DEALERS HANDLE

	Among Dealers Who Handle Vaccines Or Other Biological Products, Percent Reporting
Respondents..	175
Anchor.....	74%
Colorado Serum.....	16%
Cutter.....	41%
Dow.....	9%
Elanco.....	46%
Franklin.....	19%
Merck.....	31%
Pfizer.....	63%
Salsbury.....	28%
Other.....	6%

27. "Do you sell disinfectants or sanitizers for farm clean-up?"

Percent of (249 reporting) animal health product dealers answering "Yes"..... 87%

28. HEALTH PRODUCT DOLLAR SALES IN THE TWELVE MONTHS ENDING ABOUT JUNE 30 1980

Livestock, Poultry And/Or Horse Health Products Sold In The Feed Or To Be Added To The Feed

	Percent of Animal Health Product Dealers Reporting
Respondents.. 139	
$25,000 or more.....	20%
$10,000 - $24,999.....	31%
$3,000 - $9,999.....	28%
Under $3,000.....	21%

Average sales of feed additive health products in the 12 months ending about June 30 1980, per dealer selling any..... $16,850

"Packaged" Health Products (Injectable, Soluble, Bolus, Tablets, etc.) For Livestock, Poultry And/Or Horses

	Percent of Animal Health Product Dealers Reporting
Respondents.. 158	
$25,000 or more.....	21%
$10,000 - $24,999.....	21%
$3,000 - $9,999.....	33%
Under $3,000.....	25%

Average sales of "packaged" health products in the 12 months ending about June 30 1980, per dealer selling any..... $19,930

29. "Do you expect your future animal health product sales (after adjusting for inflation) to increase, or decrease?"

	Percent of Animal Health Product Dealers Reporting
Respondents..	242
Increase.....	53%
Decrease.....	10%
Stay about the same...	37%

30. "When a farmer comes into your store for a packaged health product, does he usually have a specific brand name that he requests without discussion?"

	Percent of Animal Health Product Dealers Reporting
Respondents..	247
Yes....	26%
No.....	74%

(a) "If 'no,' does he usually buy the brand that you recommend?"

	Among Dealers Who Answered "No," Percent Reporting
Respondents..	180
Yes....	99%
No.....	1%

31. "When a hog producer customer inquires about a new swine feed additive product that you do not yet stock, do you add it to your line?"

	Percent of Animal Health Product Dealers Reporting
Respondents..	225
All the time.....	2%
Most of the time.....	15%
Sometimes.....	51%
Occasionally.....	26%
Never.....	6%

32. "Do premium incentives motivate you to inventory new swine feed additive products?"

	Percent of Animal Health Product Dealers Reporting
Respondents..	230
Highly motivational..	2%
Sometimes.....	15%
Occasionally.....	19%
Have no influence....	64%

33. "Do you consider supplier-offered incentive travel - such as dealer and spouse all-expense paid trips - a good motivational tool?"

	Percent of Dealers Reporting
Respondents..	338
Highly motivational.....	18%
Moderately effective.....	40%
Not motivational at all..	42%

(a) "Have any of your suppliers made incentive travel offers to you in the last two years?"

Percent of (335 reporting) dealers answering "Yes"..... 57%

(1) "If 'yes,' how many suppliers?"

	Among Dealers Who Received Incentive Travel Offers From Their Suppliers In The Preceding Two Years, Percent Reporting
Respondents..	171
3 or more suppliers.....	25%
2 suppliers.....	43%
1 supplier.....	32%

Average number of suppliers making incentive travel offers, per dealer receiving any..... 2.2 suppliers

34. "Do you sell salt?"

Percent of (373 reporting) dealers answering "Yes"..... 73%

(a) "If 'yes,' what type(s)?"

	Percent of Salt-Selling Dealers Reporting
Respondents..	277
Livestock salt - block form.....	97%
Livestock salt - loose form.....	91%
Trace-mineralized salt.....	93%
Salt-based vitamin-mineral mixtures.....	45%
Water conditioning or water softening salt.....	81%
Ice melting salt.....	44%
Other.....	2%

35. "Roughly how many farms did you serve in the last twelve months?"

	Percent of Dealers Reporting
Respondents..	306
500 or more farms.....	18%
200 - 499 farms.....	31%
100 - 199 farms.....	24%
Under 100 farms.....	27%

Average number of farms served in the 12 months ending about June 30 1980, per dealer..... 264 farms